



Report to the Commissioners

Area IX Agency on Aging, Flathead County

August 20, 2018

Prepared by Lisa Sheppard, Director

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2017 actuals
FY 2018 annual targets
FY 2018 actuals
FY 2018 actuals as a percentage of annual targets
FY 2018 actuals as a percentage of FY 2017 actuals
FY 2019 actuals to date
FY 2019 annual targets
FY 2019 actuals as a percentage of FY 2019 annual targets

The general target is 8.3% for FY 2019, July 1, 2018-June 30, 2019, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as “new” in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

Data to note:

- **The # of clients receiving services** is well above target as all clients are counted as “new” in July.
- **The cost per meal** is artificially low as the recording of many expenditures lags 30+ days.
- **Outreach/Education** efforts are above target for the year due to BEC grant related outreach.
- **Meals/Nutrition**
 - Total meals served are on track for the fiscal year but are 344 less than in July of last year.
- **Transportation**
 - Total rides are 4% above target for the year at 12,480 due primarily to seasonal rides within Glacier National Park. We provided 344 more total rides than in July 2018.
 - Excluding rides within GNP, we provided 538 more rides than last year.
 - Total rides on the new Kalispell fixed route (which no longer includes Evergreen) were 2,457 compared to 2,176 this time last year. Almost all of the increase was on the PM route. Accounting for Evergreen commuter rides (which replaced the Evergreen portion of the fixed route) brings the total to 2,619 for an increase of 443 rides.
 - Our Dial-A-Ride service, which now includes paratransit rides in Kalispell plus premium DAR rides in Evergreen and west of Kalispell, provided 79 more rides this July than last (when all rides were paratransit rides related to the Kalispell/Evergreen fixed route).

- The GNP commuter taking people from Kalispell, Whitefish and Columbia Falls to Glacier National Park provided almost triple the number of rides from outside to inside the Park in July as it did in the full summer season last year. Rides within the Park were down approximately 750 due to fewer runs.
- **Independent Living Services**
 - The unit of service numbers for June were added (highlighted in yellow), ending FY 2018 at 93% of our target (as expected due to the 2.5% state budget cut).

AOA Administration

Budget and Contracts

- We submitted the final amended contract to DPHHS for FY 2018 that reflected federal funds carried over from FY 2017 and the 2.5% cut in state general funds.
- We are in the process of completing final FY 2018 reports to DPHHS. It appears we may be missing a payment from DPHHS.
- We received our FY 2019 budget allocation from DPHHS (state and federal funding) which includes an additional \$110,000 in federal funds and \$20,718 in additional state funds over our amended FY 2018 budget. We're working on a new budget to submit to DPHHS so they can prepare the FY 2019 contract.
 - The federal funds represent the full annual increase for federal fiscal year 2018 plus 9 months of the anticipated funds for federal fiscal year 2019. At this time, it appears the funding increases approved by Congress in FY 2018 will be sustained in FY 2019.
 - The increased annual base is approximately \$63,000.
 - The \$20,718 increase in state funds over the amended FY 2018 budget still includes a 2.5% cut from the base funding which appears likely to be restored. If so, we should receive an additional \$10,470.

Building

- Punch list update:
 - High temperatures in the dry storage area have reached the low 70s. We're considering CTA's suggestion of installing a large fan similar to the one in the lobby to keep the temperature below the maximum allowed temperature of 70 degrees.

HR/Staff Development

- We've filled the Assistant Director and Transportation Manager positions. Welcome to Beth Richardson and Tom Schneider.
- We have three open positions: Cook (.875 FTE) and two bus drivers (.75 FTE each).

State/Federal/Legislative Issues

- At this time, both the Senate and House versions of the FY 2019 federal budget maintain the increases for aging services achieved in FY 2018, including nutrition, IIB supportive services, caregiver support, preventive health and SHIP.
- M4A
 - Lisa attended the Governor's Council on Aging meeting in Helena July 24th.
 - Lisa will attend the quarterly M4A meeting in Helena this week.

- Lisa is participating on a subcommittee to advise the state on redesigning the Legal Services Developer program that provides federally mandated legal advice and services to older adults.

AOA Advisory Council

- The Advisory Council did not meet in July. The next meeting is September 13th.

Outreach/Education/Media

Note: Transportation related outreach is noted in the Eagle Transit section below.

- 7/1-7/12/18, announcement of AOA Advisory Council meeting in Daily Inter Lake and on County events calendar
- July issue of *Montana Woman* magazine, "Reinventing Ourselves and Our Communities in an Aging World," 20,000
- 7/2/18, monthly KGEZ interview, 15,000
- 7/2/18, public comment to Kalispell City Council on transit changes, 15
- 7/16/18 and 7/23/18, BEC outreach at Shepherd's Hand Clinic in Whitefish, 47
- 7/18/18, promotion of SNAP Double \$\$ Farmer's Market program, 200
- 7/20/18, info sharing with United Way grocery delivery program, 1
- 7/22/18, outreach to veterans regarding BEC screenings, 23
- 7/22/19, ad in Daily Inter Lake thanking Older Americans Picnic sponsors, 15,000
- 7/24/18, outreach at Whitefish Community Center, 12
- Multiple efforts to promote Legal Documents Clinic and training July 24-25 at the Whitefish Community Center, 300
- 7/27/18, outreach/info Health Department cancer screening services, 12
- 7/31/18, Medicare 101 class, 9
- 7/31/18, participation on the City of Kalispell Trail Crew, 25

Age-Friendly Flathead

- The Steering Committee met July 26th. The next meeting is scheduled for 9/20/18.
- Members agreed to begin the community survey and assessment process while continuing to build city/community interest and support.

Eagle Transit

- Montana Department of Transportation (MDT):
 - 5-Year Transportation Development Planning Grant
 - The new routes/service changes are working fairly smoothly. We've made some minor revisions based on driver and passenger feedback, including the addition of a mid-morning run on the Evergreen Commuter. We are also looking at several stop/time changes on the Tri-City Commuter.
 - Staff continue to work with the City of Kalispell regarding permitting and installation of bus stop signs.
 - The Planning Committee will meet on August 30th to determine remaining tasks to complete the process and submit a report by December 31st.
 - In July, MDT completed an audit of our financial reports for the first three quarters of FY 2018. It went well. We're waiting for the written results.
 - Final FY 2018 reports are due by mid-September.

- Outreach/Education/Media/Special Events:
 - The KPAX commercial continues to run on the CW and on Channel 8 KAJ (CBS morning show, The Price is Right and Jeopardy/Wheel of Fortune.
 - As required by federal regulations, a monthly ad ran in the Daily Inter Lake on 7/18/18.
 - The Daily Inter Lake ran one transit related article on 7/5/18, "Eagle Transit makes route changes in Kalispell"
 - Eagle Transit provided free rides to the July 4th fireworks in Whitefish.
- Operations:
 - Tom Schneider will start his new position as Transportation Manager on September 3rd which will allow some overlap with Dale before he retires. Tome was previously our Glacier National Park Operations Lead.
- Transportation Advisory Committee (TAC)
 - The TAC met on August 2, 2018.
 - The TAC's annual trip to the Park scheduled for August 16th was canceled due to the fires.
- Glacier National Park
 - Due to fires in the Park, the Lake McDonald and Avalanche areas have been evacuated and Going to the Sun Road is closed from Apgar to Logan Pass on the West Side.
 - Buses are still running on the East side.
 - Prior to the road closings and evacuations, the GNP Commuter did 6,306 rides in the Park and 1,213 rides to the Park, for a total of 7,519 rides. Last year, we did 11,442 rides.

Nutrition

- We will be re-examining staffing levels and service/menu options as a result of the increase in funding.
- We are currently recruiting for Meals on Wheels drivers in the Kalispell area.

I & R/Assistance/Ombudsman/Independent Living Services

- Veteran Directed HCBS Program
 - We are holding at 26 referrals to date.
 - The VA released new functional eligibility guidelines for the program to ensure veterans with higher needs for personal care services and/or who are experiencing difficulty accessing care through traditional programs are being served.
 - We anticipate taking the program on fully in June 2019.
- Independent Living Services:
 - We will be able to restore service levels as a result of the increase in funding.
 - Staff continue to make home visits to all existing clients to reassess their needs and conduct Benefits Check-Ups to screen them for other programs they might be eligible for and to determine their cost share rate on the sliding fee scale.
 - The new sliding fee will be reflected in the August bills to clients, which cover services provided in July.
- Client statistics:
 - 73% report physical health issues that negatively impact their quality of life
 - 75% need help with IADLS (things like managing bills/money, shopping, housecleaning, meal preparation)
 - 25% report mobility issues
 - 28% have significant vision or hearing impairments

- 55% struggle with transportation
- 17% lack adequate social connectedness
- 16% report significant financial insecurity
- 14% have mental health concerns
- 14% are experiencing some cognitive decline
- 64% live alone

RSVP

- Grant update: We finally received written confirmation from CNCS that the grant is closed out.

Senior Mobile Home Repair

- The Advisory Board met on 8/8/2018. The next meeting will be 9/12/18 at 10:00 am at Flathead Electric.
- Three projects were completed this past month; 23 are in progress; 8 need assessment; and 28 are on the waiting list.

Senior Centers - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- The Kalispell Senior Center coordinated with the other area senior centers to host the Senior Rest Area at the Fair. AOA staff sold discounted rodeo tickets on Senior Day.
- On 7/24-7/25 the Whitefish Community Center hosted the state to conduct power-of-attorney training for service providers and a Legal Documents Clinic for limited income seniors who need help with estate-planning documents like wills, powers of attorney and advanced directives. AOA assisted in promoting the clinic.
- Repair requests submitted to Mike/Commissioners:
 - The Whitefish Community Center needs roof repairs.
 - The North Valley Senior Center has requested railing along the front porch and ramp.
- Lisa will meet with the Bigfork Senior Center on August 27th to discuss next steps related to a new building.

August 2018 Report: Performance Measures Tables - July 2018 stats (FY 2019)

8.30%

MEASURE	FY 2017 Actuals	FY 2018 Target	FY 2018 Actuals	FY 2018 % of Target	FY 2018 as % FY 2017	July	Total Last Report	Total/Avg. to Date	FY 2019 Target	% Target
# Receiving Independent Living Services	178	233	110	47%	62%	not yet available		0	98	0%
# Receiving Meals on Wheels	470	465	374	80%	80%	186		186	465	40%
# Seniors Receiving Congregate Meals	1,785	1,000	1,404	140%	79%	544		544	1,200	45%
# Eagle Transit DAR Unduplicated Riders	401	500	331	66%	83%	152		152	450	34%
% of service recipients at moderate to high Risk of Institutionalization	89%	88%	92%	105%	103%	88%		88%	88%	100%
Per Meal Cost of Nutrition Services	\$6.89	\$6.75	\$6.29	93%	91%	\$1.48		\$1.48	\$7.00	21%
% Overall Satisfaction with AOA Services from Annual Survey	N = 99%, IL = 96%	95%	N=97% IL=90%			N/A			95%	
Maximum annual number of transportation complaints	30	36	12	33%	40%	not yet available		0	36	0%
WORKLOAD INDICATOR	FY 2017 Actuals	FY 2018 Target	FY 2018 Actuals	FY 2018 % of Target	FY 2018 as % FY 2017	July	Total Last Report	Total/Avg. to Date	FY 2019 Target	% Target
Outreach/Education/Media						July				
Public Outreach/Education/Media Efforts	123	120	116	97%	94%	15		15	120	13%
Nutrition						July				
Total Meals	82,428	79,000	80,639	102%	98%	6,190	0	6,190	80,000	8%
MOW	49,695		47,409	N/A	N/A	3,569		3,569		
Congregate	32,733		33,230	N/A	N/A	2,621		2,621		
Nutritional Assessments Conducted	2,424	1,550	1,846	119%	76%	355		355	2,000	18%
Transportation						July				
Total Ride Count	85,305	90,000	99,104	110%	116%	12,480	0	12,480	90,000	14%
Dial-A-Ride Count	30,025	30,000	31,645	105%	105%	2,303		2,303	30,000	8%
City, Commuter and Other Ride Count	55,280	60,000	67,459	112%	122%	10,177		10,177	60,000	17%
Eagle Transit Outreach/Special Events	40	15	42	280%	105%	4		4	24	17%
Information and Referral/Assistance						July				
Info and Referral/Assistance Contacts	17,523	18,000	19,429	108%	111%	1,626		1,626	18,000	9%
Independent Living			93%			July				0%
Homemaker Units of Service	784	2,500	2,005	80%	256%	not yet available		0	1,324	0%
Escorted Transportation Units of Service	792	1,739	2,314	133%	292%	not yet available		0	1,391	0%
Respite Units of Service	992	2,468	2,079	84%	210%	not yet available		0	3,250	0%
Community Support/Senior Companion Units of Service	1,060	1,353	1,310	97%	124%	not yet available		0	1,176	0%
Personal Care Units of Service	358	435	231	53%	65%	not yet available		0	65	0%
Benefits Counseling						July				
Benefits Counseling Hours of Service	600	450	502	112%	84%	50		50	450	11%
Ombudsman						July				
Ombudsman consults/cases opened	1034	1,100	1,250	114%	121%	104		104	1,100	9%